

Client engagement strategy

April 2022 – March 2024

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Next review date	March 2024
Affected	Clients
Approved by Client Forum?	Yes

This strategy is accompanied by the following supporting documents:

Appendix 1: Regulatory standards information

Appendix 2: Action plan for delivery of the strategy 2022-2024

Values

Respect	Empowerment
<ul style="list-style-type: none"> Value diversity and fairness Act with honesty and integrity Treat people with care and compassion 	<ul style="list-style-type: none"> Support the needs of each individual Encourage personal development and independence Provide safety, stability and security
Responsibility	Excellence
<ul style="list-style-type: none"> Work together, in partnership Take responsibility for our actions Continue learning and improving 	<ul style="list-style-type: none"> Provide a first-class service Deliver excellent value for money Explore innovative ways of working



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1. Key aims

Our strategy focuses on the delivery of our purpose to **help people to live independent and fulfilling lives**. We have a strong sense of social responsibility, and our values guide everything we do.

Equality, diversity, and inclusion (EDI) are core to our purpose and values, making them fundamental to the way we work and this underpins our approach to client engagement.

Fundamental to the development of this strategy is that it has been **co-produced** with those at the heart of our service delivery – our clients.

We are committed to ensuring that all documentation that we produce is in line with Plain English standards. We will ensure that all client-facing information has been approved by the Client Forum.



The new Client Forum group logo (see right) will be used to confirm this.

The strategy has been developed in line with our values:

- **Respect** – acknowledging that our clients have experiences and allowing them to influence the way we deliver our quality services and continue to improve them.
- **Empowerment** – ensuring that our clients have voices to influence our strategy.
- **Responsibility** – enabling clients to have a lead role and take responsibility for ensuring we deliver a solid and meaningful strategy.
- **Excellence** – ensuring that we ask for input from others to deliver an excellent strategy.

2. Purpose of the strategy

The overarching key purpose of this Client Engagement Strategy is:

- To positively and effectively engage with clients so that their voices influence our decision making.
- To enable us to enhance and continually improve our services to make us better and more effective in what we deliver to meet client needs and aspirations.
- To continue to demonstrate to our regulators and commissioners that we are fully committed to client engagement according to best practice.

3. Corporate strategic priorities

Below are the five key corporate strategic priorities that we have in place. This strategy has been developed to meet these priorities.

Further build colleague engagement, embed inspiring leadership approaches that align with outstanding client outcomes and focus on colleague wellbeing and inclusivity.

Use our resources and partnerships to create positive social and environmental impact, including implementing measures to fully understand this impact.

Improve, innovate and develop housing and support services, increase the volume and diversity of client engagement and use technology wherever it can add value. Consistently maintain property assets to a high standard.

Continue to focus on quality and compliance and be proactive in communicating positive outcomes. Increase our reputation by building on relationships with commissioners, trusted partners and other stakeholders.

Invest in new housing supply and ensure all existing assets are fit for purpose, financially viable and relevant. Extend our operating footprint, monitor opportunities for asset investment and possible mergers while ensuring financial sustainability of all services.



4. Current operating environment

This strategy factors in several issues that are important for registered providers to consider in their approach to client engagement and involvement now and in the future.

- Consumer regulation has historically had a relatively light touch approach from regulators.
- Following the Grenfell Tower fire, there has been an increasing concern that housing associations are not fully aligning their purpose with the views of clients.
- Recent issues raised on television and other media in 2021 relating to the extremely poor condition of some properties for those in social housing.

At Transform we have also acknowledged that more focus needs to be placed on what clients tell us is important to them **rather than** what we feel should be important. Having reviewed our process for securing client feedback during 2021/22, we piloted a new approach. This new process has included consultation with clients. We believe this will better enable us to improve the nature and quality of our services.

5. Best practice and regulation

With consumer regulation now being a higher area of focus, there are a range of other expectations and best practice models that we need to consider in developing our strategy.

There is a renewed focus on consumer regulation which is underpinned by new and emerging legislation, along with best practice guidance. We have reviewed these standards to ensure that our strategy enables us to deliver against them. Links to all these documents are included as Appendix 1.

6. Developing our strategy

We have worked with specialist agencies, such as TPAS, to guide and inform our approach to ensure that the strategy has been genuinely co-produced. We have benefitted from their experience and knowledge in discussing our strategy with clients to ensure that co-production, in its truest sense, has been integral to the strategy development.

Several meetings were held locally with groups of clients in nine of our locations. These meetings were attended by clients who have a wide range of support needs including, older people, single homeless people, and young people, those with mental health issues, drug and alcohol issues and learning disabilities.

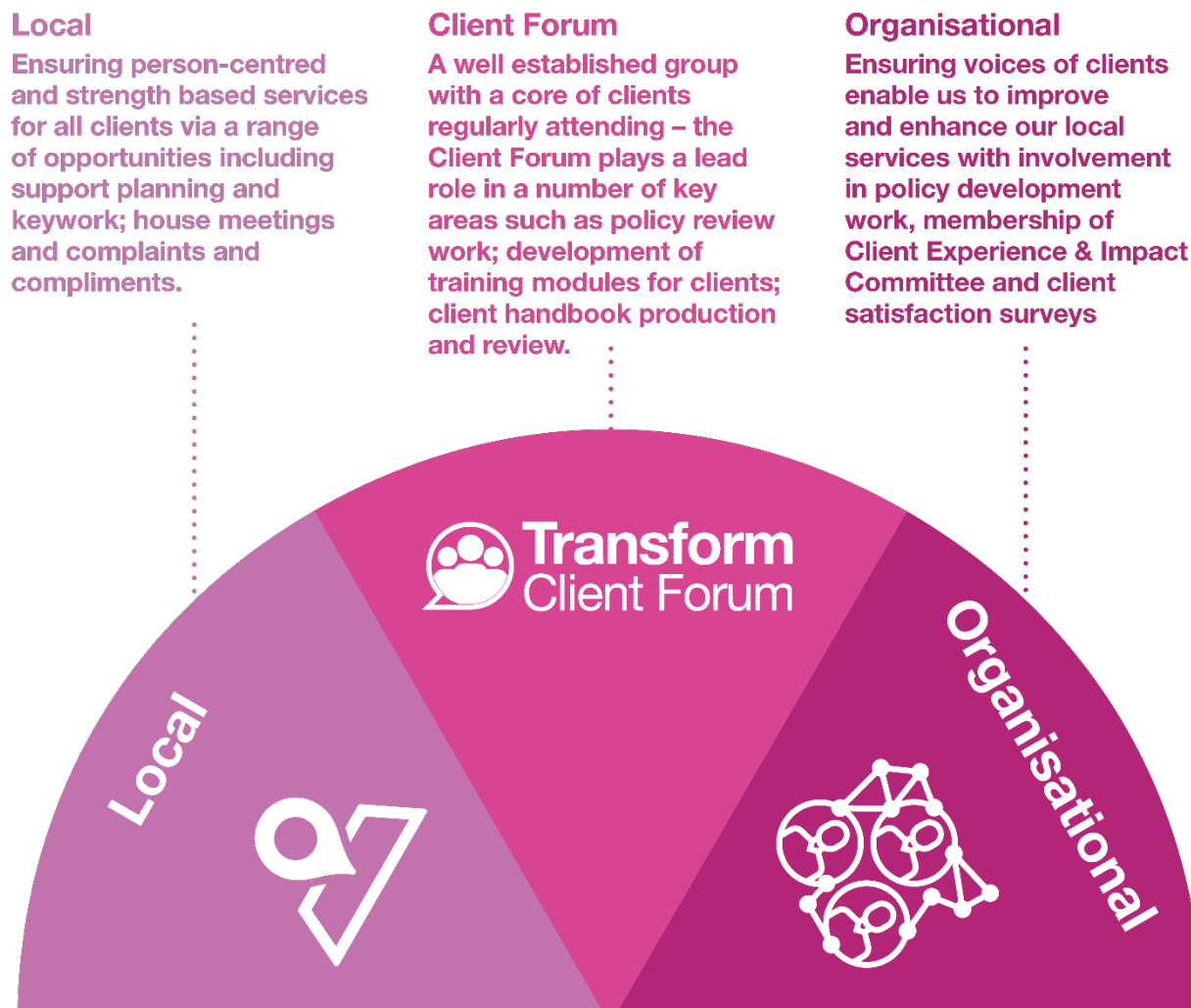
A short survey was also produced following these meetings and was shared with clients who had expressed an interest in taking part, along with being distributed by staff to other clients who had yet to be involved.

Client Forum members have taken a leading role in developing the strategy and the three key areas for client engagement, with some members also pulling together feedback.

At the Client Forum meeting in November 2021, the discussion was mainly focused on the outcome of the consultation and the strategy development. It was held in hybrid form with some clients attending in person and some online thereby opening up opportunities for more diverse engagement.

7. Three key areas of client engagement

In reviewing the feedback from the discussions with clients, we have considered options for engagement leading us to identify three key areas for client engagement. We were able to identify existing engagement opportunities as well as identify areas to further develop and improve engagement opportunities for clients.



Current areas of ongoing client engagement opportunities, under each of the three areas, are shown below:

Client Forum

This forum has been in place for more than 10 years with clear terms of reference which were refreshed in 2021. This is a well-established group with a regular core membership and it already plays a lead role in a range of areas:

- **Policy review work** is carried out by members for specific operational activities, such as complaints and safeguarding.
- **Training module development** has been a key part of the role. There are a range of modules currently available for clients with others planned for the future.
- **The Client Handbook** has been reviewed by a sub-group of the Client Forum. The new publication will be published in 2022.

Local

- Clients are included in planning how their support is provided. This ensures our services are person-centred and delivered to support clients in a strength-based way to enable them to meet their needs and aspirations.
- Feedback processes are in place with a new complaints leaflet produced in January 2021. This can be provided in different formats depending on clients' communication needs.
- House meetings and client meetings have historically been held across many of our services over the years however Covid has made that more challenging. This is something that will continue to be reintroduced as the health risks posed by the pandemic ease or are more easily managed.

Organisational

- At the time of writing this strategy, we have commenced a process to recruit clients who have lived experience to become full members of our Client Experience & Impact Committee.
- Policy development is a key function of our Business Improvement team. Policies that impact our clients directly are reviewed and approved by both the Client Forum and the Client Experience & Impact Committee before finally being signed off by Transform's Board of Trustees.
- Client satisfaction surveys have been carried out every year for the past 12 years and we have seen excellent results. As mentioned previously, we have piloted a new approach during 2021/22 which will be implemented going forward.
- Involvement in sharing stories to inspire others to support our approach to fundraising, while raising the profile of Transform and our range and breadth of services.
- Fundraising and volunteering opportunities are something that local services can get involved in currently, however this is an area that we can improve upon.

8. Other areas for engagement

As part of the consultation process, we were also able to identify other areas for engagement within the three areas, and an action plan is attached as Appendix 2 which details these further.

9. Measuring the impact of our strategy

To ensure that we are delivering the aims of this strategy, we will develop and introduce a new set of key performance indicators for the term of the strategy. These will be shared on a regular basis to the Client Experience & Impact Committee.

10. Strategy review

This strategy has been produced for a period of two years so it will be reviewed in order to inform the next stage of the strategy from March 2024.

Appendix 1

Regulatory standards information

Further information in relation to the regulatory standards, as mentioned in section five, can be found at:

Organisation	Reference
Government	New Social Housing White Paper New proposed charter for social housing residents, with seven commitments that we will need to commit to as a registered provider of social housing.
Regulator of Social Housing (RSH) Promotes a viable, efficient and well-governed social housing sector able to deliver and maintain homes of appropriate quality that meet a range of needs.	Regulatory Consumer Standards Economic and consumer standards that registered providers of social housing must comply with.
	New Tenant Satisfaction Measures being introduced by the Regulator of Social Housing in April 2023.
National Housing Federation Supports members to deliver their social purpose, with ambitious work that leads to positive changes.	Together with Tenants Charter Sector-wide initiative focused on strengthening the relationship between residents and housing association landlords.
Housing Ombudsman Improves residents' lives and landlords' services through housing complaints.	Complaint Handling Code Introduced in January 2021 which has clear expectations of how client complaints are dealt with.
Tenant Participation Advisory Service (TPAS) Promotes, supports and champions tenant involvement and empowerment in social housing across England.	The National Tenant Engagement Standards Standards that Transform wants to commit to.
Homes for Cathy A group of housing associations, charities and local authorities working together to end homelessness.	Homes for Cathy: Our commitments Nine commitments for social housing providers that Transform have signed up to.

Appendix 2

Action plan for delivery of the strategy 2022-2024

Key area		Led by	By when	Key Performance Indicator (KPI)
Client Forum				
CF1	Review the current policy on client engagement. Involvement in staff recruitment processes and relaunch with all recruiting managers	Director of Client Services	July 2022	Target set for number of interview processes clients are involved in
CF2	'Client approved' logo developed and used for all documents approved by the Client Forum	Communications & External Affairs Team	COMPLETE	Logo is utilised on all relevant documentation
CF3	Sharing the benefits for those in the Client Forum with other clients to encourage increased involvement	Director of Client Services	March 2023	Number of clients on forum buddy up with new members
CF4	Fundraising/grant-giving role to be considered and developed	Head of Business Development	December 2022	Grant requests reviewed and approved by Client Forum panel
Local				
L1	Planning and fundraising for local community activities	Housing & Support Managers	December 2022	All planned local community activities for fundraising to involve at least two clients
L2	Developing a process for mentoring with ex-clients providing peer support for new clients	Housing & Support Managers	June 2023	Peer mentors in place across all local services
L3	Identify potential resources for an organisation-wide programme to develop peer mentors	Head of Business Development	April 2023	Funds received for new service
L4	Client specific focus groups on topics important to them	Director of Client Services	March 2024	10 focus groups taken place during period of strategy
L5	Maintenance/gardening/cleaning and cyclical works specifications to be shared, so clients are aware of what to expect	Director of Asset Management & Capital Development	December 2022	All services have clear specs in place which are visible to all clients

Organisational				
O1	Enhanced partnership working within the organisation utilising the voice of lived experience at internal and external events	Head of External Affairs & Communications	March 2024	At least two events attended over two years with client input
O2	Feedback on day-to day responsive maintenance repairs to be introduced and monitored	Director of Asset Management & Capital Development	March 2023	Responsive repairs feedback in place with evidence of improvements made
O3	Consult on specs and service standards for new long-term contracts in asset management planning	Director of Asset Management & Capital Development	March 2024	Included in annual report
O4	Share performance data in relation to new repairs and improvement contracts	Director of Asset Management & Capital Development	March 2023	Included in annual report
O5	Introduction of evidence-based Outcome Star tool for clients to self-assess progress against a range of areas to improve outcomes for them in their lives	Director of Client Services	March 2023	Impact data produced annually to evidence benefits of services
O6	Involvement and engagement in 50th anniversary events	Head of External Affairs & Communications	December 2022	Clients involved in local and other event planning
O7	Local annual client events to be introduced – budget and Covid allowing	Housing & Support Manager	2023/24	At least every service to hold an event over the two years of the strategy
O8	Client Experience & Impact Committee membership role for clients	Director of Client Services	September 2022	Two committee members have lived experience
O9	Identify fundraising resources to fund a client engagement role to support the implementation of the strategy	Director of Client Services	December 2022	Postholder in place to take forwards
O10	Involvement in website development and social media	Head of External Affairs & Communications	March 2023	Lived experience and stories shared across all social media platforms
O11	Mapping of regulatory standards and best practice to be carried out to evidence how the strategy meets those requirements	Director of Client Services	March 2022	Clear evidence to meet best practice and regulatory standards
O12	Improving upon quality assurance processes, developing a process for clients' involvement in local service peer audits	Head of Business Improvement	2023/24	Internal audit programme rolled out with clients involved in the process